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AUTHOR Howley-Rowe, Caitlin; Chadwick, Kristine
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ABSTRACT

Education reform and technical assistance systems have been criticized for their inability to sustain significant, long-term improvements in teaching and learning. One method that has shown success is the use of an external facilitator in comprehensive school-change efforts. In collaboration with the Virginia Department of Education, the Appalachia Educational Laboratory (AEL) conducted several diverse technical assistance activities designed to increase the capacity of external facilitators working in the Governor's Best Practice Centers to effectively work with schools and school divisions. Four activities are described in this report, including: (1) the facilitation of strategic planning for the Best Practice Centers; (2) a workshop on data-based decision-making; (3) an algebra study group to finalize and test elements within a proposed algebra resource compendium; and (4) a training for external facilitators. Participants in processes codeveloped by AEL were somewhat to highly pleased with the services provided. The effectiveness with which AEL performed its work may have been influenced by the political realities and uncertainties that it confronted as a new state department of education entity. AEL will need to continuously build and nurture collaborative relationships when the development of products involves several groups who may have competing priorities. An appendix contains a completed evaluation standards checklist. (RT)

Evaluation of Collaborative Efforts between AEL and the Virginia Governor's Best Practice Centers

By

**Caitlin Howley-Rowe
Kristine Chadwick
AEL, Inc.**

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October 2000

**EVALUATION OF COLLABORATIVE EFFORTS BETWEEN AEL AND THE
VIRGINIA GOVERNOR'S BEST PRACTICE CENTERS**

By

**Caitlin Howley-Rowe
Research Associate**

**Kristine Chadwick
Research & Evaluation Specialist**

October 2000

**AEL, Inc.
P.O. Box 1348 • Charleston, West Virginia 25325 • 1-800-624-9120**

AEL's mission is to link the knowledge from research with the wisdom from practice to improve teaching and learning. AEL serves as the Regional Educational Laboratory for Kentucky, Tennessee, Virginia, and West Virginia. For these same four states, it operates the Eisenhower Regional Consortium for Mathematics and Science Education. In addition, it serves as the Region IV Comprehensive Technical Assistance Center and operates the ERIC Clearinghouse on Rural Education and Small Schools.

Information about AEL projects, programs, and services is available by writing or calling AEL.

AEL, Inc.
Post Office Box 1348
Charleston, West Virginia 25325-1348
304/347-0400
800/624-9120 (toll free)
304/347-0487 (fax)
aelinfo@ael.org
<http://www.ael.org>

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ABSTRACT

Education reform and technical assistance systems have been criticized for their inability to sustain significant and long-term improvements in teaching and learning. One method that has shown success has been the use of an external facilitator in comprehensive school change efforts. An external facilitator aims to help schools and districts internalize the practices and processes that result in continuous improvement. In a collaboration with the Virginia Department of Education, AEL conducted several diverse technical assistance activities designed to increase the capacity of external facilitators working in the Governor's Best Practice Centers to effectively work with school and school divisions (districts). Four activities are described in this report, including (1) the facilitation of strategic planning for the Best Practice Centers, (2) a workshop on data-based decision making, (3) an algebra study group to finalize and test elements within a proposed algebra resource compendium, and (4) a training for external facilitators working with Comprehensive School Reform Demonstration program.

It may be that as AEL works in partnership with others to build capacity for state-directed technical assistance for education improvement initiatives, greater flexibility of each partner is required to work directly with schools and districts. The success of AEL's work with the Algebra I study group in which AEL staff were able to work directly with individual teachers through collaborative efforts and assistance of the GBPC in the region suggests this. Obviously, the effectiveness with which AEL carried out its work with the GBPCs may have been influenced by the political realities and uncertainties that they confronted as new creations of the state department of education. As a viable partner seeking to serve as a catalyst for stimulating opportunities for schools and divisions to access needed "external" technical assistance for school improvement initiatives, AEL will need to continuously build and nurture short- and long-term collaborative relationships when the development of products involves several groups who may have competing priorities.

Supporting Education Organizations for School Improvement

Education reform and technical assistance systems have been criticized for their inability to support significant and sustainable improvements in teaching and learning, despite the investment of substantial public funds. Some of the factors that often defeat the creation of meaningful change are short-term, stop-gap professional development workshops; misfits between innovations and school contexts; and the challenges of adapting reform materials developed elsewhere. Moreover, schools and districts often lack what may be called an external facilitator. The external facilitator function, carried out by either an individual or team, assists schools in developing their capacity for continuous improvement. AEL envisions the external facilitator as responsible for analyzing the reform-minded school from an objective vantage point and guiding the school through the reform process.

In its *2000 Updated Annual Plan* (1999), AEL defines the external facilitator role to include a variety of important tasks and foci, including

1. focusing on whole-school improvement and ensuring that all strategies fit into a comprehensive framework
2. promoting a culture of informed decision making driven by R&D-based knowledge and action research
3. monitoring the process of school reform (with key school personnel) so that problems can be identified and addressed expediently
4. establishing a support infrastructure at the school for change to occur
5. involving school staff in ongoing monitoring and evaluation of the implementation, viewed in conjunction with student performance
6. providing school information and direction to external technical assistance providers to ensure that products and services are appropriate to the school context.

AEL contends that the assistance of external facilitators is critical to the success of technical assistance and school change. Ultimately, however, the external facilitator aims to help schools and districts internalize practices and processes that result in continuous improvement.

In response to the challenges of supporting school reform, AEL has proposed a new approach to technical assistance based on action research, quick response to requests for aid, and collaborative product and process development. A multi-pronged strategy, this innovative form of technical assistance has included intensive site work and the development of a curriculum mapping and alignment process. Permeating this work has been the external facilitator function. These efforts have taken shape under Task 6 of the *AEL 2000 Updated Annual Plan*.

Governor's Best Practice Centers

As part of its new approach to technical assistance, AEL proposed to support other selected education organizations in incorporating the external facilitator function into their services. The first of these efforts has been to assist the newly organized network of Governor's Best Practice Centers (GBPC) in Virginia. Established in September 1998, the GBPCs were designed to work with local school divisions in meeting the new Virginia Standards of Accreditation through successful student achievement of the Standards of Learning (SOL) as measured by the SOL tests. Three centers were established in September 1998, and five more in September 1999. Each GBPC serves a Superintendents' Regional Study Group, or educational region, consisting of approximately 15 to 20 school divisions, and about 250 schools (Virginia Department of Education, 2000).

The Virginia Department of Education (VDOE) requested AEL's support with the training of GBPC staff and developing products and services tailored to specific school division, regional, or statewide needs. To this end, AEL developed a research and development project to help build the capacity of the GBPCs to in turn build the capacity of schools for meeting the SOLs. Activities of this project have included

- assistance with GBPC strategic planning
- training on assessment and data-based decision making in the development site of Scott County, and the attendant development of a handbook for use by GBPC staff
- the development and refinement, through the facilitation of a teacher study group, of a resource compendium for assisting Algebra I teachers to help their students achieve the SOLs and
- training of external facilitators assigned to work with schools receiving Comprehensive School Reform Demonstration (CSRD) program funds.

The purpose of this report is to document work undertaken through Task 6, Activity 6.1.2. In addition, this report is intended to present evaluation findings about these efforts so that AEL staff may make any needed modifications in their approach should they continue to support intermediary education organizations.

The primary audience for this narrative includes AEL staff responsible for developing and implementing Task 6 work. Other audiences are the U.S. Department of Education's Office of Educational Research and Improvement (OERI), from whom AEL receives funding; other researchers and practitioners interested in supporting intermediary education entities; and participants in the work described in this report.

Findings

Descriptive and evaluation findings are presented in this section of the report. Each of the four major efforts undertaken as part of Task 6 is described below.

Strategic Planning

To support the new GBPCs, AEL's Resident Director for Virginia attended VDOE meetings at which GBPC issues were discussed. During these meetings, the Resident Director established relationships with state department staff leading the GBPC initiative and garnered their support for AEL's new research and development project on assistance to intermediary organizations charged with the external facilitator role. Collaboration between AEL and the GBPC network would both inform AEL's knowledge base about the external facilitator function and assist the network in building its ability to serve schools and divisions in that capacity.

As a result of connections with VDOE and GBPC personnel, two AEL staff members assisted GBPC staff in preparing strategic planning retreats on February 18, 1999 and February 24-25, 1999, in Richmond, Virginia. An AEL staff member facilitated the February 18 session, and AEL's Resident Director served as session recorder during the second and third strategic planning sessions.

During the strategic planning process, VDOE and GBPC staff developed and refined their guiding belief, mission, goal, and objectives statements. GBPC staff also clarified their definition of "best practices" such that various levels of best practice were identified based upon certain types of evaluative information. GBPC staff brainstormed the kinds of assistance activities that should be provided by the centers to schools and divisions under the categories of curriculum alignment, instruction, assessment, leadership, and technology. Participants in the planning sessions additionally identified a variety of issues schools must confront and strategies they might undertake in order to improve student achievement. Priority activities were decided for each regional GBPC as well.

Ultimately, AEL's participation in the strategic planning process with the directors of the initial three GBPCs provided essential information and direction for the five additional GBPCs. A total of eight GBPCs now serve school divisions in the state. In addition, GBPC staff agreed to collaborate with AEL in the development and production of an assessment handbook and an Algebra I resource guide.

Scott County *Strategies for Improving Instruction* Workshop

As part of an initiative to provide school divisions with data-based decision making skills in order to increase student achievement on the Virginia SOLs, AEL developed a handbook on using data and provided workshops for school and division administrators. The research and development work leading to the handbook began in the fall of 1998. Much of the work was done in partnership with the GBPC in Marion,

Virginia, which had received a request for assistance from the Scott County School Division, a local education agency (LEA). AEL collaborated with the Marion GBPC in conducting the intensive development site work in the LEA. As the work progressed, direct technical assistance was shifted from AEL to the GBPC as a project goal has been to build GBPC and LEA capacity to use data for improvement of planning and instruction.

In April 1999, the Marion GBPC and AEL, with GBPC staff taking the lead, conducted a workshop on strategies for improving instruction for school and school division administrators. Workshop participants consisted of the division superintendent, key central office administrators, and building principals. Sixteen workshop attendees completed a post workshop evaluation form. The results from this rating form are reported below.

Workshop participants were asked what position(s) they held in the schools or central office. Many respondents checked more than one response so all participants are listed in Table 1 with the positions they reported to hold. Fourteen of the participants were administrators at the schools, and two participants were from the central division office.

Table 1: Positions held by participants at April 1999 workshop in Scott County, Virginia

Participant	Central Office	K-3 Administrator	Gr. 4-5 Administrator	Gr. 6-8 Administrator	Gr. 8-12 Administrator	Other Position
1		✓	✓			K-6 Administrator
2		✓	✓			
3				✓	✓	
4						Not specified
5						Not specified
6		✓	✓	✓		
7		✓	✓	✓		
8		✓	✓	✓		
9					✓	
10					✓	
11					✓	
12			✓	✓		
13		✓				K-4 Principal
14		✓				
15	✓					
16	✓					

Overall Rating of Workshop. Workshop participants were asked to rate the overall quality of the workshop on a 5-point scale, from 1=poor to 5=outstanding. The average score was 4.08, or "above average." Ratings ranged from "average" (n=2) to "above average" (n=8) to "outstanding" (n=3). Three participants did not provide a score.

Usefulness of Information. On the same 5-point scale, respondents rated four aspects of the workshop session. The results are presented in Table 2. Reactions to the workshop were positive. The average rating given to the workshop aspects was an "above average" score. The most variation in responses was found for the planning activity. While half of the respondents ranked that activity as "above average," 25% rated it as "average," and 25% gave it an "outstanding" score.

Usefulness of Presentation Modes and Materials. Participants were asked to provide feedback on the presenters and the materials provided at the workshop. Respondents marked a continuous line between 0 and 50, with 0 indicating a "not at all" score and 50 representing a "very much" score. These scores were multiplied by two to provide a percentage between 0 and 100%, similar to common grading systems, in order to facilitate interpretation of the scores. Table 3 presents the "grades" given by the workshop attendees. The materials provided to the workshop attendees received mixed ratings as to their usefulness. The standard deviation indicates that some of the participants found the materials to be useful but others did not find them as useful. The presenters were considered to be skilled and knowledgeable, and were generally responsive and provided clear explanations.

Table 2: Descriptive statistics on the items assessing the usefulness of workshop session elements

Workshop Session Element	N		Mean	Median	Mode	Standard Deviation
	Valid	Missing				
Information/strategies regarding curriculum and instruction	16	0	4.13	4.00	4	.62
Information/strategies regarding "observation" and other aspects of school organization and structure that enhance learning	16	0	4.13	4.00	4	.62
Information/Strategies regarding accessing information resources, e.g., using technology	16	0	4.00	4.00	4	.63
Planning activity	16	0	4.00	4.00	4	.73

Table 3: Descriptive statistics on the items assessing the presentation of the workshop

Workshop Presentation Element	N		Mean "Grade"	Standard Deviation
	Valid	Missing		
Responsiveness of the presenters to your needs during the session	15	1	84%	9.9%
Extent of presenters' skills and knowledge	16	0	87%	9.4%
Clarity of presenters' explanations	16	0	84%	9.8%
Usefulness of materials provided	16	0	80%	14.3%

Participants' Comments and Suggestions. Workshop attendees were asked three questions to which they wrote responses. The answers given to these questions are organized by how each respondent rated the workshop overall. Please refer to Tables 4-6 for these written responses.

In sum, the workshop in Scott County was generally well received by the school and division administrators who attended. The presenters were acknowledged as skillful and as having a lot of valuable information to share with school personnel. Some of the participants reported that the workshop felt too rushed, and would have liked to have had more time. There was an acceptance among administrators that the Virginia SOLs were there to stay and that they needed to prepare themselves and their staff to increase the quality of teaching in order for students to achieve passing scores.

Table 4: Participants' responses to the prompt, "What I really liked and why."

Participants' overall rating of the workshop	What participants really liked and why
(Blank; Did not answer question)	Review of lesson model.
3=Average	I like having a source for obtaining information (the websites provided). The Powerpoint presentation should be used by all staffers.
4=Above Average	- Hunter's Lesson / Time management. - The fact that it dealt with the school/classrooms. - Focusing everyone on objective (SOLs). - Review of PAT
5=Outstanding	- The Best Practice Center's people's attitude (positive) in assisting us in Scott County and our quest to achieve passing scores on the SOL testing. - This session was a good "break" from the earlier ones in that it didn't deal with SOLs directly or scores—but did deal with leadership, evaluations and things we as principals deal directly with in helping teachers. - Presenters are very "down to earth" and present useful materials.

Table 5: Participants' responses to the prompt, "What I would recommend doing differently and why"

Participants' overall rating of the workshop	What participants would recommend doing differently and why.
3=Average	◆ Do a workshop on Steven Covey. I enjoy him. Provide data on that "wealth of knowledge." Show some actual databases.
4=Above Average	<<No comments>>
5=Outstanding	◆ Longer session—it seemed all presenters were rushed. I would have liked to learn more. ◆ I think time was used very effectively—somewhat rushed in presentation; however, still very effective because of personalities of presenters!

Table 6: Other comments/suggestions

Participants' overall rating of the workshop	Other comments/suggestions
3=Average	◆ Steve Sage spoke about students' success before moving on to another objective. This issue can be debated. Do I need success for all students? What level of mastery are you talking about? At some point educators must learn to be effective planners. Allocate sufficient time for each SOL and move on. There can be levels of success for most.
4=Above Average	<<No comments>>
5=Outstanding	◆ Doris Redfield's information has been very useful.

As noted earlier, AEL and staff from the GBPC in Marion, Virginia, worked with the Scott County central office staff, school board, and principals to develop and provide training on using SOL data at the district, school, and classroom levels between December 1998 and April 1999. A result of this effort was a draft handbook for use by GBPC staff, which was to be critiqued by those receiving April 1999 training on the handbook content. Although feedback on the handbook has not been forthcoming from GBPC staff, in part due to changes in GBPC leadership, the AEL-IHE (Institutions of Higher Education) Co-Venture awarded an internship to a University of Tennessee doctoral student to update the handbook so that it now contains three years of data. The data sets and training materials are currently being produced.

AEL intends to collaborate with the Eisenhower Regional Consortium for Mathematics and Science Education to revise the handbook so that it is more directly useful to school and classroom practitioners. In addition, it is hoped that the revised product will be applicable beyond Virginia.

Algebra I Resources for Virginia Teachers

As indicated by the 60% failing rate on the first administration of the Algebra I SOL test in the spring of 1998, many students in Virginia have had difficulty mastering

Algebra I concepts. Prealgebra and Algebra teachers must focus their instruction to address the 19 Algebra I SOLs. Although various resources have been available to Virginia teachers as they undertake this new challenge, many continued to request user-friendly information about the state standards, specific examples of appropriate instructional methods and assessments, and further detail about the Algebra I concepts covered in the SOLs.

AEL and the Harrisonburg GBPC collaborated during 1999-2000 to develop a resource compendium for Algebra I teachers that would compile existing example lessons and create others to address teachers' needs. AEL conducted a study group of Algebra I teachers to field test and refine activities correlated to the SOLs. Participants were solicited with the assistance of the Harrisonburg GBPC staff, and were offered advance use of the compendium, networking opportunities with other Algebra teachers, a small stipend of \$200, mileage reimbursement for meeting participation, acknowledgment in the final product, and re-certification credit as locally approved. In return, study group participants were asked to participate in an orientation meeting, assist in the development of the compendium, field test suggested activities, provide written feedback on the materials used and the guide itself, and participate in three meetings to share experiences with others and to advise guide developers.

A total of four Algebra I teachers participated in the study group. Although six were originally recruited, two were unable to participate fully. The study group facilitator, an AEL staff member, reported that although a larger sample of participants might have added richness and depth to evaluations of the compendium, four appeared to be sufficient.

The study group convened three times at the Valley Vocational-Technical Center in Fishersville, Virginia. An initial meeting was held in August 1999 with the study group members and AEL, GBPC, and VDOE staff to introduce the project.

The second meeting was held February 29, 2000. At this gathering, participants discussed some of their evaluations of various activities in the compendium, shared ideas about activities they had developed for inclusion in the resource, and received some professional development from a consultant. In addition, as the facilities included a computer lab, participants gained experience submitting their assessments of compendium activities using an on-line lesson plan evaluation tool.

Participant reaction to the February 29 meeting of the Algebra resource guide study group is presented in the second column of Table 7. Respondents were asked to rate their level of agreement with 30 statements, using a 5-point scale, with 1 indicating strong disagreement and 5 indicating strong agreement. All four participants completed and returned the evaluation form.

Participants tended to agree strongly with most positively worded assessments of the meeting. Mean ratings for these items ranged from 3.50 (indicating moderate agreement that facilities at the study group meeting site were adequate, and moderate

agreement that participants found it easy to find time to contribute to the group's listserv), to 5.00 (indicating a very high level of agreement that the study group listens to individuals' contributions and that the facilitators kept the group on task).

With mean ratings of 1.50, the negatively worded items received little agreement from respondents. Participants reported, for instance, that the study group's listserv and on-line lesson plan evaluation form were not confusing.

The February 29 meeting of the Algebra I resource guide study group appears to have been quite successful. Participants believed they were being skillfully facilitated through a useful process ultimately leading to the development of a needed user-friendly and comprehensive resource compendium with potential for impacting student achievement in Virginia.

A third and final working meeting was held June 1, 2000. During this event, participants again discussed their appraisals of compendium activities, shared ideas, but did not receive any professional development as the consultant was unavailable. The AEL facilitator was present.

Participant reaction to the June 1 meeting of the study group is shown in column 3 of Table 7. All four participants completed and returned the evaluation form. As before, they were asked to rate their agreement with 30 statements using a 5-point scale for their responses. Because the number of participants is so small, mean ratings should be interpreted with caution.

Ratings for positively worded items were again high. Although participants reported less agreement than they had in the previous evaluation that it was easy for them to find time to post to the study group's listserv and complete the on-line lesson plan evaluation forms, with means of 2.50, they also disagreed that both electronic forums were confusing to use (1.00).

No items received mean ratings of 5.00, but many closely approximated such a high rating with means of 4.75. Respondents strongly agreed that the study group was representative of Virginia Algebra teachers, that there were ample opportunities for discussion and questions at the group's meetings, that the ultimate product would be useful and make an impact on student learning, and that the group was committed to its work.

To conclude, the June 1, 2000, study group meeting appears to have been very well received by participants. Finding time for contributions to the listserv and the on-line lesson plan evaluation may have been of some concern to respondents, but the study group process, facilitators, participants, and goals were viewed positively by those involved.

**Table 7: Mean ratings of Algebra Resource Guide study group meetings,
N=4**

Item	February 29, 2000 Mean	June 1, 2000 Mean
1. Study group meetings have been held at convenient locations.	4.50	4.50
2. The people in the study group are representative of the variety of Algebra teachers in Virginia.	4.50	4.75
3. I understand the purpose(s) of the study group.	4.75	4.50
4. The study group listens to what I have to say.	5.00	4.50
5. The facilities at the study group meeting site(s) is/are adequate.	3.50	4.00
6. My opinion is important to this Algebra resource guide development process.	4.75	4.50
7. There were ample opportunities for questions and discussion at study group meetings.	4.50	4.75
8. The professional development activities during the study group meetings have been informative.	4.75	4.25
9. The professional development activities during the study group meetings have offered me the opportunity to develop skills that are relevant to my needs.	4.50	4.50
10. The facilitators of the study group try to make sure everyone's opinions are heard.	4.75	4.50
11. The facilitators of the study group keep the group on task.	5.00	4.75
12. I believe that the guide we are developing will help to increase Algebra scores on the SOL exams.	4.75	4.75
13. Lessons from the resource guide will help Virginia students better understand Algebra.	4.25	4.50
14. I am satisfied with the direction in which the study group is going.	4.50	4.75
15. The activities from the resource guide address a variety of learning styles and developmental needs.	4.50	4.25
16. The people involved in the study group are deeply committed to doing their part to make the resource guide better.	4.50	4.75
17. The facilitators of this study group really know how to collaboratively develop instructional materials.	4.50	4.50
18. Being involved in the study group has been a very valuable experience for me.	4.50	4.75
19. I believe that the study group has the capability of helping to produce an Algebra resource guide that will benefit Algebra students in Virginia.	4.50	4.75
20. The activities within the resource guide were useful to me.	4.50	4.50
21. The activities within the resource guide will be useful to Algebra teachers in Virginia.	4.75	4.75
22. The advance communications that I received in the mail from AEL and/or the Governor's Best Practice (BPC) were useful to me.	4.75	4.75
23. I found the study group's listserv to be confusing to use.	1.50	1.00
24. I found the online lesson plan evaluation form confusing to use.	1.50	1.00
25. I was easy for me to find enough time to post on the listserv.	3.50	2.50
26. It was easy for me to find enough time to complete the online lesson plan evaluation forms.	4.50	2.50
27. It was easy for me to find a computer with e-mail access so that I could post to the listserv.	4.50	4.75
28. It was easy for me to find a computer with Internet (World Wide Web) access so that I could complete the online lesson plan evaluation forms.	4.50	4.75
29. Each section of the resource guide includes all the information it needs to include (i.e., it is comprehensive).	3.75	4.25
30. The resource guide is easy to use.	4.25	4.50

At the June 1, 2000, meeting, study group members were also asked to provide feedback about the overall experience of participation. A questionnaire with seven open-ended questions solicited participants' evaluations of the study group process, challenges to participation, future use of the compendium, and feedback about the collaboration between AEL, VDOE, and the GBPCs.

All four study group members reported that they had gained useful information or resources as a result of their participation. One additionally noted that he or she had gained knowledge about technology. Asked about the challenges associated with their involvement in the study group, three participants said that time had been an issue: Two noted that the time needed to complete field tests of all the compendium activities had presented difficulty, and one reported that scheduling meetings had been challenging although completed successfully. Another participant wrote that competing demands deflected his or her attention from study group obligations.

Two respondents suggested that the challenges mentioned above might have been minimized had the group met more frequently. Another two offered praise for the support that had been offered during the project to address some of the difficulties: One liked the study group listserv, and one appreciated "how easy it was to get answers to my questions or concerns."

All participants indicated that they intended to use the final version of the resource guide in their classrooms. As one put it, "I plan to further use the lessons and also the sponge activities. I think that the presented resources will also be a big help to me and others in the future."

Asked who should receive the completed compendium, all four replied that at least one copy of the guide should be distributed to every school, so that every Algebra I teacher had access to it. Respondents had differing opinions about the need for professional development about the guide for those receiving it. Two reported that training on the compendium was not necessary. "I really do think that this document can stand by itself!!" wrote one participant. The remaining two respondents suggested that some professional development might be helpful.

Participants were asked to provide feedback about the collaboration between AEL, VDOE, and the GBPC. Two respondents indicated that the project would have been strengthened with more representation and input from VDOE staff, and another suggested that "making sure that all teachers are aware of what's available and have access to those materials" would be a wise strategy. One study group member reported that a strength of the collaboration had been the "online/e-mail networking which kept us all connected even though we were all over [the state]." A weakness of the collaboration, wrote one respondent, was that "we were included on [sic] 'brainstorming' that I'm not sure we were needed for."

In reply to the final open-ended question soliciting any additional comments, questions, or suggestions, all four respondents expressed appreciation for the study group experience. For instance, one participant reported that the facilitator "did an outstanding job responding to e-mail, coordinating meetings, and adjusting to unexpected events." Suggestions included developing similar resource guides for Geometry and Algebra II teachers, "alignment with the CASIOs rather than the 83s," creating overhead transparencies to coordinate with sponge activities, and distributing the final compendium to all Algebra I teachers.

Participant feedback, then, suggests that the study group was well-coordinated and useful as professional development to those involved. Although time and competing demands were challenges participants faced, these were not insurmountable. Teachers intended to use the final compendium in their own classrooms and hoped that it would be widely distributed. The study group listserv was seen as a strength of the experience, assisting with communication and coordination of work. Some respondents would have liked more participation from VDOE staff during the process. Overall, though, participants were pleased with their experience.

In terms of the study group product, the Algebra consultant who had provided professional development to the participants was also engaged to analyze the on-line lesson plan evaluation forms to complete revisions of the compendium. Unfortunately, due to changes in the consultant's other professional obligations, such analysis has yet to be completed. AEL staff are currently considering hiring another Algebra consultant to bring the project to closure.

CSRD External Facilitator Training for GBPC Staff

An abbreviated version of AEL's Academy of External Facilitators was provided to GBPC and the VDOE Office of Compensatory Programs staff November 1-2, 1999, in Richmond, Virginia. A total of 22 individuals participated in this training, 15 of whom were staff of GBPCs.

Presented as an orientation to external facilitation, the event's goals were to (1) build an awareness of the roles and responsibilities of an external facilitator of schools undertaking reform funded through the Comprehensive School Reform Demonstration (CSRD) program; and (2) prepare an engagement plan for helping low-performing schools build capacity for improvement. In addition, AEL CSRD staff articulated daily objectives to be achieved during the training. Objectives for the session on November 1 were to

- examine school reform and the CSRD program from the national perspective
- introduce the role of the external facilitator in comprehensive school reform
- increase the capacity to analyze and understand school culture
- understand the impact of key influences on a school undergoing change including school culture, state education contexts, externally developed models, and the nine CSRD components.

Objectives for November 2 were to

- make inferences as to why schools demonstrate certain strengths and weaknesses
- stimulate reflection and discussion about strategies leading to action for change
- develop and refine expertise to work more effectively with groups
- develop an engagement plan for working with individual schools.

The training was designed and presented by AEL CSRD staff in conjunction with several consultants who served as members of the Academy for External Facilitators design team. It should be noted that external facilitation with regard to CSRD is defined somewhat differently than the external facilitation function described in the Introduction of this report.

Because it was not deemed cost-effective to evaluate the training in a comprehensive manner, assessment of the workshop was conducted via the administration of a final evaluation questionnaire. Only 12 of the 22 participants completed and returned this instrument, representing a return rate of 55%. It is unclear why so few forms were returned.

Section A of the evaluation form asked respondents to reply to items related to various logistical aspects of the institute using a 5-point scale, with 1 indicating a response of "never or not at all" and 5 indicating a response of "always or very." Section B asked respondents to rate the extent to which various institute objectives were met using a scale identical to that in Section A. Tables 8 and 9 present data from these two sections of the evaluation form, including mean ratings and the percent of those agreeing or strongly agreeing with statements. Finally, Section C posed five open-ended questions concerning the helpfulness of the event, suggestions for improvement, further assistance AEL might offer, and any remaining concerns.

Overall, participants rated logistical characteristics of the orientation fairly high (see Table 8). Receiving the highest mean rating was the extent to which AEL staff and presenters were responsive to attendees' requests for assistance and service (4.46, SD .69). Staff were skilled (4.33, SD .78) and knowledgeable (4.33, SD .98), according to those who replied to the instrument. Respondents were somewhat less satisfied, however, with the format of the orientation, with a mean rating of 3.50 (SD 1.24); only 50% of respondents reported being satisfied with this aspect of the event. The large standard deviation also suggests that there was some disagreement among respondents on this issue.

Ratings on Section B items suggest that respondents felt the extent to which the orientation achieved goals and objectives was adequate, although not outstanding (see Table 9). The highest mean rating of 4.42 (SD .67) was given for the extent to which respondents learned from other participants. The degree to which respondents' knowledge of strategies leading to action for change increased received the lowest mean rating of 3.50 (SD 1.00). Also of note is the large standard deviation (1.51) for responses

to the item concerning the adequacy of technical assistance and support received for the development of engagement plans. The mean for this item, 3.58, indicates that such assistance could have been strengthened for some respondents.

Table 8: Mean ratings on external facilitation orientation final evaluation form, section A

Item	N	Percent Agree	Mean	SD
1. Did AEL carry out planned activities at the times scheduled?	12	75%	4.17	.83
2. How responsive were AEL staff and/or presenters to your requests for service and/or assistance during the orientation?	12	90%	4.46	.69
3. How knowledgeable were AEL staff and/or presenters?	12	83%	4.33	.98
4. How skilled were AEL staff and/or presenters in completing their tasks?	12	83%	4.33	.78
5. How well were your information needs met at this orientation?	12	58%	3.75	1.36
6. How useful were the materials provided to you during this orientation?	12	67%	3.92	1.17
7. How satisfied were you with the format of this orientation?	12	50%	3.50	1.24
8. How useful do you anticipate this orientation will be to your work?	12	67%	4.08	1.08

Table 9: Mean ratings on external facilitation orientation final evaluation form, section B

Item	N	Percent Agree	Mean	SD
1. To what extent did you acquire an understanding of the roles and responsibilities of external facilitators?	12	58%	3.75	1.29
2. To what extent did the orientation help you increase your capacity to analyze and understand school culture?	12	67%	4.00	1.05
3. To what extent did your knowledge of the CSRD program increase?	12	58%	3.75	1.36
4. To what extent did you receive adequate technical assistance and support for developing your engagement plan?	12	67%	3.58	1.51
5. To what extent did you learn from other participants?	12	92%	4.42	.67
6. To what extent did you develop/refine your expertise to work more effectively with groups?	12	75%	3.92	.90
7. To what extent did your knowledge of strategies leading to action for change increase?	12	50%	3.50	1.00
8. To what extent did your understanding of the impact of school culture on reform initiatives improve?	12	58%	3.75	.75
9. To what extent did your skills for analyzing school culture improve?	12	67%	3.83	.94
10. To what extent did your understanding of your own problem solving approaches improve?	12	58%	3.75	.97
11. To what extent did your understanding of others' problem solving approaches improve?	12	58%	3.75	.75

Asked in Section C of the evaluation form what had been the most helpful part of the orientation in terms of helping respondents work in low-performing schools, nine of

the 12 total respondents replied. Two offered responses with multiple themes. Two respondents each reported that the sharing of ideas and the materials had been the most useful components. The remaining replies were idiosyncratic. Of use to these respondents were descriptions of the external facilitator role, the Kirton Adaption-Innovation Inventory, the group synergy exercise, specific steps described for analyzing school plans, and the orientation's interactive format. One respondent gave a more critical answer: "If it weren't for Ben Perez [presenter], I wouldn't have gotten anything from these two days."

Four respondents answered the question about what concerns they still had about their work in low-performing schools. One reported having no concerns, and one was concerned about finding sufficient time to work as an external facilitator while also maintaining her other duties. Two respondents had concerns about their new role; one asked, "Can I really be of assistance, or will I be in the way?" The second wondered "how to encourage schools to cover gap areas."

Asked what assistance they might want AEL to provide as external facilitators began their work in low-performing schools, six of the 12 respondents replied. All six requested in some manner that AEL keep in contact with participants, sending updates and helpful tips.

Ten respondents replied when asked in what ways the orientation could be improved. Three of these gave responses with multiple themes. Three comments each suggested that the content of the orientation was too basic given the knowledge and experience of the participants and that attendees would have preferred more active engagement. Two respondents recommended that the storytelling portion of the orientation be limited or eliminated. One suggested that the working lunch be cut, and another requested more breaks. The presentation style and delivery of some orientation presenters concerned a respondent, who wrote that there had been "too much bird walking, rambling, elaboration." Two remaining respondents reported that they had no recommendations.

Nine participants responded to the final query, "Is there anything else you'd like to tell us about your experiences at the orientation to external facilitation?" Five comments simply offered praise or thanks. For example, one respondent wrote that the orientation was a "very good experience," and another said, "All presenters made me feel comfortable learning." Four comments, however, were more critical. Three of these suggested that the content of the orientation had limitations: Two respondents thought their knowledge levels had been underestimated, and a third reported that the orientation focused too much on process at the expense of content. Another respondent felt the pace was too slow and suggested more careful editing of PowerPoint presentations.

In sum, the orientation was fairly well received by participants. However, evaluation respondents had a few concerns. Already versed in education reform research, some reported that the content of the training was too basic. Others requested more engaging activities and less storytelling. Respondents reported that the orientation's goals

and objectives had been achieved, although perhaps not to the very highest degree. Hence, the orientation was relatively successful, and might have been more so with a few modifications.

Conclusions

Several conclusions may be drawn based on the data collected.

It appears that the AEL Resident Director participated in GBPC meetings and facilitated assistance to the centers based on their stated needs. In addition to aiding in the facilitation of strategic planning meetings, AEL staff also collaborated with GBPC staff to offer assessment training, develop an assessment handbook for center staff, facilitate a study group for the refinement of a compendium of resources and strategies to assist Algebra I teachers to accommodate the SOLs in instruction, and provide training in external facilitation. In addition, the two proposed products, the assessment handbook and the Algebra I resource compendium, are advancing toward completion.

Participants in processes and meetings co-developed and co-facilitated by AEL tended to be somewhat to highly pleased with these services. The Algebra I study group was particularly satisfactory in this regard. The CSRD training for external facilitators, however, was less well-received.

The content presented at the CSRD training for external facilitators may have been too basic and introductory given the levels of knowledge and experience held by state department and GBPC staff.

It may be that as AEL works in partnership with others to build capacity for state-directed technical assistance for education improvement initiatives, greater flexibility of each partner is required to work directly with schools and districts. The success of AEL's work with the Algebra I study group in which AEL staff were able to work directly with individual teachers through collaborative efforts and assistance of the GBPC in the region suggests this. Obviously, the effectiveness with which AEL carried out its work with the GBPCs may have been influenced by the political realities and uncertainties that they confronted as new creations of the state department of education. As a viable partner seeking to serve as a catalyst for stimulating opportunities for schools and divisions to access needed "external" technical assistance for school improvement initiatives, AEL will need to continuously build and nurture short- and long-term collaborative relationships when the development of products involves several groups who may have competing priorities.

References

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Appendix:
Completed Evaluation Standards Checklist

Checklist for Applying the Standards

To interpret the information provided on this form, the reader needs to refer to the full text of the standards as they appear in Joint Committee on Standards for Educational Evaluation, *The Program Evaluation Standards* (1994), Thousand Oaks, CA, Sage.

The Standards were consulted and used as indicated in the table below (check as appropriate):

Descriptor	The Standard was addressed	The Standard was partially addressed	The Standard was not addressed	The Standard was not applicable
U1 Stakeholder Identification	x			
U2 Evaluator Credibility	x			
U3 Information Scope and Selection		x		
U4 Values Identification	x			
U5 Report Clarity	x			
U6 Report Timeliness and Dissemination	x			
U7 Evaluation Impact	x			
F1 Practical Procedures	x			
F2 Political Viability	x			
F3 Cost Effectiveness	x			
P1 Service Orientation	x			
P2 Formal Agreements	x			
P3 Rights of Human Subjects	x			
P4 Human Interactions	x			
P5 Complete and Fair Assessment	x			
P6 Disclosure of Findings	x			
P7 Conflict of Interest	x			
P8 Fiscal Responsibility	x			
A1 Program Documentation	x			
A2 Context Analysis	x			
A3 Described Purposes and Procedures	x			
A4 Defensible Information Sources	x			
A5 Valid Information	x			
A6 Reliable Information	x			
A7 Systematic Information	x			
A8 Analysis of Quantitative Information	x			
A9 Analysis of Qualitative Information	x			
A10 Justified Conclusions	x			
A11 Impartial Reporting	x			
A12 Metaevaluation	x			

The Program Evaluation Standards (1994, Sage) guided the development of this (check one):

- ☐ request for evaluation plan/design/proposal
- ☐ evaluation plan/design/proposal
- ☐ evaluation contract
- ☒ evaluation report
- ☐ other: _____

Name Caitlin Howley-Rowe Date 11/29/00

Caitlin Howley-Rowe

(signature)

Position or Title Research Associate

Agency AEL, Inc.

Address 1031 Quarrier Street Charleston, WV 25301

Relation to Document Co-author

(e.g., author of document, evaluation team leader, external auditor, internal auditor)